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AUTHOR Lehman, George
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ABSTRACT

This workbook provides a model for mental health professionals to use in developing and implementing a plan for their self-directed job-related learning and skill enhancement. The materials describe techniques for mastering a specific body of knowledge. Questionnaires are provided to help the user organize individual needs and goals; suggestions are also given for finding personal assistance, as well as methods for measuring progress and setting up rewards. The workbook stresses that professionals in any field can benefit from learning a new skill and thinking about the issues related to developing learning strategies. (JAC)

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Self-Directed Professional Development (SDPD)

WORKBOOK/Vol. II

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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By George Lehman

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Growth Associates would like to acknowledge the significant contribution of Marvin Parrish and Dean Kliewer to the development of the SDPD concept.

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This workbook serves a specific purpose for a specific group of people: to provide a structure for mental health professionals to use in developing and carrying out a plan for their own self-directed job related learning.

The applicability of the book is not, however, limited to the specific group known as mental health professionals. Any professional who desires to learn a new skill and wants assistance in thinking through the issues related to developing that learning strategy will benefit from this information.

The publication culminates a four-year research project in Self-Directed Professional Development (SDPD) sponsored by the National Institute of Mental Health and carried out by the Growth Associates division of Prairie View, Inc. During the course of this four-year study, Growth Associates has developed a number of different approaches to assist mental health professionals in developing their own self-directed learning plan. The workbook has been tested and refined at a number of points during the four-year process.

Central to the SDPD project were the assumptions that: a) adults by and large learn differently than children (as in self-directed learning compared to teacher-directed learning); and b) professionals may need help in effectively utilizing adult learning processes in new content areas.

Malcolm Knowles is most often associated with the concept of self-directed learning. A detailed treatment of the theory of self-directed learning for adults can be found in Knowles' book, The Adult Learner: A Neglected Species. Briefly, Knowles suggests three major differences between how adults learn and how children learn. 1) As a person grows and matures, his/her self concept moves from one of dependency to one of increasing self-directedness. At the point that a person achieves a sense of self-direction, the learner is no longer willing to fit into a passive pupil role. 2) The accumulated experiences of the adult learner are a major resource and starting point for learning as compared to the need to provide children with a standard context for learning to take place. 3) Adults tend to have a problem-centered orientation to learning, focusing their learning on problems they have encountered or may encounter in the very near future. Children often tend to fit into a subject or course-oriented learning environment.

Figure 1 contains a more systematic listing of the self-directed and teacher-directed learning assumptions.

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Figure 1a

ASSUMPTIONS

	Pedagogical	Andragogical
	Teacher-directed Learning	Self-directed Learning
Concept of the learner	Dependent Personality	Increasingly Self-Directed Organism
Role of Learners' Experience	To be built on more than used	A Rich Resource for Learning
Readiness to Learn	Dictated by curriculum	Develops from life tasks and problems
Orientation to Learning	Subject-Centered	Task or Problem Centered
Motivation	External Rewards and Punishments	Internal Incentives, Curiosity

The body of theory and practice on which teacher-directed learning is based is often given the label "Pedagogy," from the Greek word paid (meaning child) and agogus (meaning guide)--thus being defined as the art and science of teaching children.

The body of theory and practice on which self-directed learning is based is coming to be labeled "Andragogy," from the Greek word aner (meaning adult) --thus being defined as the art and science of helping adults (or, even better, maturing human beings) learn.

Figure 1b

	PROCESS ELEMENTS	
	Pedagogy	Andragogy
CLIMATE	Authority-oriented Formal Competitive	Mutuality Respectful Collaborative Informal
PLANNING	By teacher	Mechanism for mutual planning
DIAGNOSIS OF NEEDS	By teacher	Mutual self-diagnosis
FORMULATION OF OBJECTIVES	By teacher	Mutual negotiation
DESIGN	Logic of subject matter Content units	Sequenced in terms of readiness Problem units
ACTIVITIES	Transmittal techniques	Experiential techniques (inquiry)
EVALUATION	By teacher	Mutual re-diagnosis of needs Mutual measurement of program

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If you wish to work on something unrelated to a job, you can do that, but you need to recognize that the language is work oriented.

Figure 2 describes research done by Tough on a selected sample of 66 people. Note that there is a fairly wide range of the number of learning projects per year for this group but that, on the average, people were able to identify about eight different learning projects.

Figure 2b describes the number of hours spent on the learning projects. Notice that we are suggesting that the average person can identify from one-fourth to one-third of a full-time job as time spent in learning projects.

By now, it should be obvious that learning projects are not isolated from the rest of one's life. They are often integrated into work or recreation. A person's desire to learn to play racquetball may include reading books, setting up individual practice time, and conversing with other people about racquetball techniques in addition to the actual competition. Clearly, the learning, practice and conversation could be called a learning project in Tough's definition. Many people find that certain aspects of cooking, sewing, gardening and various leisure activities are learning projects.

Figure 2c gives a list in order of occurrence for the different reasons people are involved in learning projects. Note that the two most common reasons for learning projects relate to specific job requirements or needs. For most of the work you will do in this workbook, we assume it is understood that we are talking about self-directed learning for job-related concerns.

If Malcolm Knowles is the broad theoretician of the self-directed learning movement, a principal researcher or data gatherer is Allen Tough of the University of Toronto. Tough's major contributions have included the development of a language of adult learning to aid in documenting the quantity and nature of adult learning. Tough has developed the building block phases of "learning episode" and a "learning project" as a way of describing adult learning. In some ways, these are words that are parallel to the "individual class sessions" and the "course" in traditional learning.

Tough defines a learning episode as "short time periods in which the person's intention is to gain and retain certain definite knowledge and skills".[1] Reading for pleasure where there is no attempt at retention would not be a learning episode. Reading for pleasure where you consciously desire to remember what you are learning for future use would be a learning episode.

A significant learning that you happen to remember might not be a learning episode by this definition unless you intended to remember it. As we shall see later, this definition, while it sounds a bit restrictive, applies to a substantial amount of activity for most adults.

Tough then suggests that a learning project is a "series of clearly related learning episodes covering at least seven hours." Note that both of these are somewhat arbitrary definitions of what is already happening in the real world. They have value in that they provide a means of communicating that activity.

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Figure 2

SELECTED SAMPLE OF 66 PEOPLE

A) How many learning projects per year?

Range:	0-20
Mean:	8.3
Median:	8

B) How many hours total are spent on learning project?

Range:	0-2600
Mean:	816
Median:	687

C) What are the reasons for doing learning project?

1) Preparing for an occupation or keeping up.
2) Specific problems on the job.
3) Learning for home or personal responsibilities.
4) Improving a general competence.
5) Learning for leisure.
6) Curiosity.

Many people are somewhat stunned when they see these descriptions of SDL time and activity. They suggest that the sample of 66 people probably represents a very select group of highly motivated individuals rather than a population at random. Figure 3 describes the number of learning projects and the number of hours for those projects by different occupational groups in this sample of 66 people. The number of people surveyed here is too small and the range of occupations too limited to make any good generalizations about how different occupations vary in terms of the amount of self-directed learning taking place.

One interesting item is that lower-white-collar men in this small sample apparently spent about twice as much time at self-directed learning projects as lower-white-collar women, even while doing the same number of projects. Possible interpretations include: a) men are less efficient learners; b) men are more thorough learners; c) men have more time for self-directed learning; d) men are more job involved. Further research is needed on this.

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Figure 3

COMPARING POPULATIONS: MEANS AND MEDIANS

Population	Total hours at all learning projects	Number of learning projects	Mean number of hours at each learning project
Professors (N=10)	1491	12.0	117
	1745	11.5	97
Politicians (N=10)	1189	6.7	190
	908	7.0	135
Lower-white-collar men (N=10)	907	9.1	111
	827	8.5	114
Factory workers (N=10)	800	5.5	146
	799	5.5	116
Lower-white-collar women (N=10)	430	8.2	48
	425	8.5	44
Teachers (N=6)	395	10.2	42
	371	9.0	43
Mothers (N=10)	331	7.2	47
	273	6.5	46

NOTE: Each cell describes the average or typical learner in the sample. The first figure in each cell is the mean; the figure below it is the median (the "middle" person).

(Tough, Allen, The Adult's Learning Projects, page 21, published by Learning Concepts, Austin, Texas 78705)

With all this self-directed learning apparently going on, why is there a workbook to teach people how to do self-directed learning? One way to think about the need for a workbook is to recognize that while people are doing quite a bit of learning on their own, most professional people also have areas they would like to study but somehow never quite get around to. Figure 4 suggests a continuum for choosing a learning strategy that recognizes a balance between traditional learning and unstructured self-directed learning.

Areas in which the learner consistently has trouble or lacks background skills are not good areas for self-directed learning. For those areas, formal educational processes should be used or people should simply decide to do nothing.

At the other end of the continuum, there are areas in which most of us are already doing a fair amount of satisfactory learning. The person with the enjoyable occupation or hobby may already have that learning process very well in hand. An obvious rule of thumb is: if you are already learning everything you need to know, don't change anything.

The middle area is where the participant already has some skill and expertise but desires to learn more, and is somewhat frustrated in that desire. Persons finding themselves in that setting may discover that the self-directed learning techniques and methods described in this workbook provide a method and a structure for mastering a body of knowledge previously learned only infrequently and haphazardly.

Use the continuum on choosing a learning strategy as a way of sorting out for yourself some different areas where you might like to do some learning. Many people find it helpful to list four or five items in each of the three areas to illustrate where there is: a) frustration or lack of background; b) desire for self-directed learning; or c) satisfactory learning.

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Figure 4

LEARNING STRATEGY ALTERNATIVES

CURRENT LEARNING SITUATION	Areas in which I have no background or things I repeatedly have trouble with	I have some skill and expertise but desire to learn more	Things I am good at and/ or already am learning
STRATEGIES	Formal educational processes Ignore it	Use SDL techniques and methods to develop a learning plan and contract	Don't change anything
PERSONAL ILLUSTRATIONS			

Up to this point, we have not talked about the issue of continuing education for mental health professionals and the need to document that. The documentation and accreditation of self-directed learning is a major focus of some educational institutions and professional associations. Some of the issues related to accreditation are dealt with more fully in the gathering of papers called "Guidelines for Self-Directed Learning." It is not the purpose of this particular workbook to provide structure and guidelines for giving college or continuing education credit for self-directed learning. This is consistent with the fact that most adult learners' needs come from the direct requirements of a job for which credits or documentation of learning are not as important as solving the problems at hand.

The following brief article by Allen Tough describes additional research on self-directed learning and change. It provides additional background on this whole process of self-directed learning.

SELF-GUIDED CHANGE

A research team in Toronto recently probed and listened at some length as 45 women and men told us about their largest change during the past two years. In these interviews we included only intentional change. That is, the person made a definite decision to change in a particular direction. The decision was made fairly freely: being fired or accidentally becoming pregnant would not count as intentional changes. The person then took one or more definite steps to achieve the change: the person did something to produce the change.

The interviews were conducted in Toronto, a thriving city of two million persons. We did our best to tap the entire adult population of Toronto, age 25 and over, with as little bias as possible.

Intentional changes are mostly do-it-yourself. It is largely the person herself or himself who chooses, plans, and implements the change. The person often obtains significant help from friends and other peers, but only rarely from professionals and books.

These insights emerged from asking our interviewees to decide who performed each of three major tasks: (1) choosing, (2) planning, and

(3) achieving the change. The first task was described in more detail as "making the initial choice of this particular change, and the decision to proceed with it." The second task was "deciding how to achieve the change; planning the strategy; deciding how to deal with problems along the way." And the third was "taking the steps for achieving the change; that is, actually doing whatever is necessary for achieving it."

A handout sheet gave the person those descriptions of the three tasks and a list of six possibilities for who might have performed each task. For each task in turn, the person was asked, "How would you divide the credit or responsibility for performing this task? That is, what percentage of the task was performed by you, and what percentage by each of the others in the list?"

Lumping together the percentages for all three tasks, the mean percentage for the interviewees themselves was 76%. In the typical intentional change, then, the person responsible for about 76% of the choosing, planning, and implementing. In many changes it is 100%, of course, and certainly the most common situation is for the person to retain much more than half the responsibility for the entire change process. The opposite extreme--when someone else is dominant--occurs only rarely: 9% of the time for planning the strategy, and much less for the other two tasks. In about 22% of all changes, though, the responsibilities are shared by two or more persons with no one dominant.

Eighty-two percent of the interviewees gave credit to one or more peers for helping to perform the task. Specifically, peers were described as "one or more friends, relatives, acquaintances, co-workers, or neighbors--individual one-to-one interaction (possibly with one or two other persons also present)." The total amount of responsibility accounted for by peers was 16%, far higher than any other category except the interviewees themselves.

The other four categories were used only rarely, and consequently accounted for only a small percentage of the responsibility for performing the tasks. My predictions before the interviews were far too high for these four categories, and far too low for the category of the person herself or himself. The category of "books, booklets, magazines, other printed material, television, films, tapes, cassettes, phonograph records" accounted for only 2% in Table 1. And peer groups ("a group of people who met fairly regularly, and who almost always met without a professional or expert as the leader or resource person") accounted for only 2%.

TABLE 1

Who Performed the Tasks of Choosing the Change, Planning the Strategy, and Achieving the Change?

Resource	Mean percentage
The person himself or herself	76
Peers one-to-one	16
Peer groups	2
Books and other nonhuman resources	2
Professionals one-to-one	3
Professionals in a group	1

NOTE: Each of the 45 interviewees gave percentages separately for each of the three tasks, but for this table the data from the three tasks were combined.

The final two categories involved "a person who was paid to help, or was doing so as part of his or her job, or was designated by some organization to help, or was trained to help." We might loosely call such a person a professional helper--a person who was paid, employed, designated, or trained to help. In individual one-to-one interaction they accounted for 3% of the total responsibility, but only 1% as a leader or speaker in a group situation.

Only a small proportion of intentional changes rely much on a professional helper. Clearly professional help is not the central core of most changes. It is simply one fact of some change projects.

When it is present, though, professional help can make an important contribution. The instructor in an evening course on Jung, for example, and then a Jungian analyst in private sessions were useful in helping an art consultant "to understand Jung's thought and myself. A psychiatrist helped a mother become willing to let her 18-year-old daughter marry and make her own decisions. A diet workshop was useful to one woman, and a general practitioner medical doctor persuaded another woman to quit smoking.

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One mother (trying to change her relationship with her two teenagers) received helpful advice from a teacher at her son's secondary school. On the job, two women were helped by their supervisor or personnel manager to improve their responsibilities or title.

On four measures of the magnitude and success of the change, the changes with significant professional help were about the same as other changes or a little higher. Changes with professional help are not dramatically better or more successful than other intentional changes, nor do changes that are 100% self-guided turn out to be particularly inferior or ineffective.

Professional help played a less central role in certain other changes. It was useful in them, but somehow not at the core. For example, two persons used a realtor and a lawyer while buying or selling property, and another person used professional movers. Medical doctors were used by two women who decided to have a baby. As part of enlarging her horizons and social life, one woman attended a community college cooking class.

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One way to begin to assess one's own learning style in a variety of situations is to take the following brief survey of learning patterns and attitudes. There are no right or wrong answers to this test, but it may provide further insight into how much you like to work in various self-directed learning situations versus how much you like to learn in more teacher/instructor-oriented situations.

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INSTRUCTIONS: With each item, circle the answer which most nearly expresses your level of agreement according to the key provided at the right.

1 = strongly disagree
2 = moderately disagree
3 = mildly disagree
4 = neutral
5 = mildly agree
6 = moderately agree
7 = strongly agree

1.	I seldom find the time to keep up with new developments in my profession.	1 2 3 4 5 6 7
2.	My learning is dependent on having a good teacher.	1 2 3 4 5 6 7
3.	I look forward to the day when I will not need to be so concerned about career development.	1 2 3 4 5 6 7
4.	I usually read at least 5 or 6 good books a year just on my own initiative.	1 2 3 4 5 6 7
5.	I like to separate my professional life and my personal life as much as possible.	1 2 3 4 5 6 7
6.	I truly feel that I learn something new and significant just about every day.	1 2 3 4 5 6 7
7.	I rather resent having other people tell me what I need to know.	1 2 3 4 5 6 7
8.	It is really difficult to keep abreast of professional developments once a person gets out of school.	1 2 3 4 5 6 7
9.	When I was in school I sometimes had difficulty getting my assignments in on time.	1 2 3 4 5 6 7
10.	Other people tend to regard me as an independent thinker.	1 2 3 4 5 6 7
11.	If I only had more energy, I might be able to get somewhere.	1 2 3 4 5 6 7

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12.	I have a lot of good ideas regarding what I might do to enhance my professional development.	1 2 3 4 5 6 7
13.	When a task really needs doing, I somehow find the time.	1 2 3 4 5 6 7
14.	I undertake several self-directed projects a year.	1 2 3 4 5 6 7
15.	My present circumstances make professional development nearly impossible.	1 2 3 4 5 6 7
16.	It is difficult for me to be a productive learner independent of a course structure.	1 2 3 4 5 6 7
17.	In order to develop professionally a supportive context is essential.	1 2 3 4 5 6 7
18.	Competing for a good grade helps me learn more.	1 2 3 4 5 6 7
19.	Reading professional literature is an enjoyable activity.	1 2 3 4 5 6 7
20.	I like to try out new things on my job.	1 2 3 4 5 6 7
21.	My rate of acquiring new learning has decreased since I left school.	1 2 3 4 5 6 7
22.	I read professional journals regularly.	1 2 3 4 5 6 7
23.	My work tends to interfere with my professional development.	1 2 3 4 5 6 7
24.	Meeting my professional development needs would require more time than I have available.	1 2 3 4 5 6 7
25.	I regard myself as an ambitious person.	1 2 3 4 5 6 7

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26.	I have well-established professional goals.	1 2 3 4 5 6 7
27.	I think that continuing education requirements for my profession should be as specific as possible.	1 2 3 4 5 6 7
28.	My continuing professional development is essentially limited to what is formally required or expected.	1 2 3 4 5 6 7
29.	Continuing education needs are generally best met for most people by their periodically returning to the university for refresher courses.	1 2 3 4 5 6 7
30.	I have ideas or information which merits formal publication.	1 2 3 4 5 6 7
31.	My career is going downhill.	1 2 3 4 5 6 7
32.	I am excited about the ideas I have for my own professional development.	1 2 3 4 5 6 7
33.	My professional development efforts have usually been rewarding.	1 2 3 4 5 6 7
34.	I need a stimulating environment in order to learn and progress.	1 2 3 4 5 6 7
35.	I have usually experienced some difficulty expressing my ideas in writing.	1 2 3 4 5 6 7
36.	I have not kept up with what is going on in my field.	1 2 3 4 5 6 7
37.	Setting goals often proves fruitless.	1 2 3 4 5 6 7
38.	I am primarily responsible for the current level of expertise I have obtained in my field.	1 2 3 4 5 6 7

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39.	I usually find that externally imposed structuring of my learning activity tends to interfere rather than facilitate.	1	2	3	4	5	6	7
40.	I like what I do as a professional and I want to do it better.	1	2	3	4	5	6	7

This same questionnaire was given to a group of pretty highly motivated self-directed learners. There were nine items with which that group disagreed, but the two strongest were "my continuing professional development is essentially limited to what is formally required or expected" and "my career is going downhill." A close third was "my present circumstances make professional development nearly impossible."

There were also a number of items where this group of self-directed learners were in substantial agreement. These include "I usually read five or six good books a year just on my own initiative" and "I like to try out new things on my job." Figures 7 and 8 give all of the items for which there was either consistent agreement or consistent disagreement.

While there is no right or wrong score for the self-directed learner on this learning scale, if you find yourself in major disagreement with the items checked by the self-directed learners, you may wish to ask yourself whether this approach is one that really fits your own interests and abilities. Some of us, as a matter of personal disposition, prefer more structured learning settings to less structured ones. If you prefer the structured setting, self-directed learning probably isn't going to be something you really enjoy.

Figure 7

ITEMS FOR WHICH THERE WAS HIGH AGREEMENT ON THE "SELF-DIRECTED LEARNING SCALE" (N=16)

1. I usually read 5 or 6 good books a year just on my own initiative. (6.4)
2. I like to try out new things on my job. (6.3)
3. I am primarily responsible for the current level of expertise I have obtained in my field. (6.3)
4. My professional development efforts have usually been rewarding. (6.1)
5. When a task needs doing, I somehow find the time. (6.0)
6. I like what I do as a professional and I want to do it better. (6.0)
7. I am excited about the ideas I have for my own professional development. (5.9)
8. I have a lot of good ideas regarding what I might do to enhance my professional development. (5.9)
9. In order to develop professionally a supportive context is essential. (5.7)
10. I need a stimulating environment in order to learn and progress. (5.5)

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Figure 8

ITEMS FOR WHICH THERE WAS LOW AGREEMENT ON THE "SELF-DIRECTED LEARNING SCALE" (N=16)

1. My continuing professional development is essentially limited to what is formally required or expected. (1.8)
2. My career is going downhill. (1.8)
3. My present circumstances make professional development nearly impossible. (1.9)
4. My learning is dependent on having a good teacher. (2.1)
5. I have not kept up with what is going on in my field. (2.2)
6. Setting goals often proves fruitless. (2.2)
7. Competing for a good grade helps me learn more. (2.3)
8. It is difficult for me to be a productive learner independent of a course structure. (2.4)
9. Continuing education needs are generally best met for most people by their periodically returning to the university for refresher courses. (2.4)

Much of actual self-directed learning experience seems to tie in with preparation for a job and doing the actual work on the job. This would imply that a successful self-directed learning project often corresponds to the understanding of one's current job and long-range career ambitions. This certainly has been a consistent conclusion in the SDPD project. If self-directed learning is tied to job-related issues, then the more successfully one can tie the self-directed learning projects with those longer range job and career issues, and the more satisfaction and accomplishment will come from the self-directed learning project.

A unique way of thinking about job and career involvement--providing some guidance about what job-related learning to strive for--comes from Edgar Schein at Massachusetts Institute of Technology. He developed the idea of career anchors as a new way of thinking about long-range career direction. Let's look at this concept together. We'll tie it directly to what you are doing when we finish.

Read the following description of career anchors and fill out the career anchor self-analysis form. When you get to the end of the form, you will be asked to make an assessment of the relative importance to you of each of the career anchors. Don't worry if you can't identify a single anchor as being the most important. We'll talk about that later.

CAREER ANCHORS

Much of the work in the area of career planning has been focused on issues of entry into a profession. The whole area of guidance counseling and the development of the Strong-Campbell Interest Inventory and various other tests has been oriented to the question of how one makes the right decision about which career to enter. Recently, Edgar Schein from the Massachusetts Institute of Technology developed a new way of thinking about career decisions, emphasizing the tasks of people as they are already established in some types of career areas.

In a nutshell, Schein suggests that adults who have been working and who may have already changed jobs two or three times have developed for themselves a "career anchor" that they use to make job and career change decisions. People may not always be consciously aware of this career anchor, but with a little help, they can generally identify one or more career anchors that have, indeed, been the guiding factors in their own job and career evolvement.

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Schein suggests that this career anchor is made up of at least three components. The first of these is self-perceived talents and abilities based on actual success in a variety of work settings. The second is self-perceived motives and needs based on opportunities for self-testing and self-diagnosis in real situations, and on feedback from others. The third is self-perceived attitudes and values based on actual encounters between self and the norms and values of the employing organization and work setting.

It should be noted that Schein says it is not possible to predict career anchors from tests. Chosen career anchors evolve out of the individual's own integration of experiences related to work. Also, a career anchor may extend across quite different vocational areas. It is an anchor that can guide you in accepting jobs within a variety of vocations.

In summary, the career anchor is "the pattern of self-perceived talents, motives, and values that seems to guide, constrain, stabilize, and integrate the person's career."

Briefly stated, the five career anchors that Schein has discovered in his research are:

1. Technical/Functional Competence. Some people orient all of their working life around increasing involvement in technical knowledge or a functional specialty. These people are particularly concerned about feeling competent in a specific area and are not particularly interested in management.

2. Managerial Competence. These people are basically looking for management positions and will do that within a whole range of functional areas. These people see themselves as having a strong ability to analyze situations and good competence in interpersonal situations. They tend to have fairly high emotional resilience.

3. Security. Some people tend to anchor their careers around positions that are pretty low on risk and emphasize security. One image of civil servants is that they tend to be people who are looking for security as their primary career anchor and can tolerate a fair amount of job dissatisfaction if they have that security. It should be clear that great ambition and security do not fit together. Security is not, however, tied to low productivity.

4. Creativity. This anchor is one that is hard to define. It may be a crucial factor in understanding the career of the entrepreneur. The people who have creativity as a career anchor are people who wish to be always trying something new. They get very frustrated going over ground covered before. They will shift from one area of technical knowledge to another if they are sure they are involved in the cutting edge of some new type work. These people get bored whenever any program or project becomes routine.

5. Autonomy. For people in this group, a prime concern is that the working area be free of organizational constraints so they can pursue their own areas of particular interest. This anchor is often combined with another anchor. People who have this anchor would decline opportunities to pursue their specialties in areas where they would be closely supervised in deference to less adequate situations with greater independence.

One implication of all this is that people can change jobs and vocations fairly radically without actually changing careers. This is obvious with managers who move from one company to the next, always performing management tasks. In the area of sales, which is probably a technical specialty, people will sell almost any type of product. It is also true that people may move from one job to the next on the basis of security, autonomy, or creativity and still be within their own personal chosen career anchor, in spite of major job content changes.

The corollary is that you can stay within the same general vocation, even within the same company, and make a radical career change without ever knowing it. The engineer who shifts from a job that requires technical/functional competence to one requiring managerial competence has indeed made a major career shift. Whether he or she consciously chose to make that shift is another issue.

There are limitations to this concept. One is that the research has been done on a very limited scale; specifically, the sample was M.I.T. business school graduates. A second is that there is no clear tool for identifying a career anchor. A third problem is that the range of operating career anchors may not have been identified correctly. Schein, himself, suggests that service, power, variety, and a company identity might also be career anchors for some people.

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Going through this set of career anchor information and doing a bit of self-reflection is quite helpful for people in getting a mindset and a perspective for thinking about future career movement.

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CAREER ANCHOR SELF-ANALYSIS FORM

In the questionnaire you are asked to give objective information in the left-hand column and reasons for your choices, decisions, etc., in the right-hand column. Be spontaneous in your answers. The main purpose is to give you information about yourself which will help you to determine your own career anchor.

EXTERNAL FACTORS AND EVENTS	INTERNAL REASONS AND FEELINGS
1. What was your major area of concentration in college?	Why did you choose that area? How did you feel about it?
2. Did you go to graduate school? If yes, what was your area of concentration; what degree did you get?	Why did you go or not go?
3. What was your first job after school? (Include military if relevant)	What were you looking for in your first job?

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4. What were your ambitions or long-range goals when you started your career? Have they changed? When? Why?

5. What was your first major change or job or company?

Did you or the company initiate it? Why did you initiate it or accept it?

What were you looking for in your next job?

Continue to list what you consider to be the major job, company, career changes you see in your career. List each step and answer the questions for each step.

6. Change _____ Why did you initiate or accept it?

What were you looking for?

7. Change_____ Why did you initiate or accept it?

What were you looking for?

8. Change_____ Why did you initiate or accept it?

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What were you looking for?

9. As you look back over your career, identify some times you have especially enjoyed it.

What about those times did you enjoy?

10. As you look back, identify some time you have not especially enjoyed it.

What about those times did you not enjoy?

11. Have you ever refused a job move or promotion?

Why?

12. How would you describe your occupation to others?

What do you see yourself to be?

13. Do you see any major transition points in your career? Describe the transition objectively.

How did you feel about it?

Why did you initiate or accept it?

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Review all of your answers in the right hand column and look for the pattern in the answers. Do you see any anchor in the answers?

_____

_____

Rate each of the anchors below based on your aoswers above, from 1 to 5; 1 = low importance, 5 = high importance.

Managerial competence _____

Technical/functional competence _____

Security _____

Creativity _____

Autonomy _____

Many people experience some difficulty in picking out one single career anchor for themselves. Schein suggests that as people become older and have more successful career experiences, a single anchor will become more clear. He also suggests that while more than one of these anchors may be quite important to us, with time we become clearer about what trade offs of security, creativity, etc., we are willing to make.

Many mental health professionals find themselves high on the career anchor of technical and functional competence and the anchor of autonomy. The question they have to face comes when they find themselves in a situation where they have to choose an environment in which one of the anchors is appropriate and the other isn't. Which do they choose? For example, a mental health professional whose anchor is technical and functional work is willing in an environment where there is close supervision as long as he/she is able to continue to do family therapy, which is part of the technical career anchor.

A person in the same initial setting, having technical/functional and autonomy career anchors might say that he/she is willing to learn to use a different approach to therapy or he/she might work with a completely different client group, in order to stay with, or join, an agency where personal autonomy is accepted and highly valued.

Now that you've gone through this process, the question becomes: how do these answers fit in with your own plans for self-directed learning and professional development? It appears that the content of self-directed learning is different for each person depending on the career anchor.

Specifically, we hypothesize that people for whom managerial competence is a career anchor will want to plan for their self-directed learning around the tasks of problem solving, interpersonal competence, and developing their own emotional resilience and coping methods. Schein suggests that these three specific abilities--present in many other anchors but interrelating particularly in the area of managerial work--are the key factors for a successful managerial performance.

Technical/functional competence people will want to plan for their own self-directed learning around an area that fits their current work performance and interest, or at least is somehow related to that. Technically-oriented clinicians whose specialty has been family therapy probably should not try

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to develop a self-directed learning project in the area of, for example, evaluation. However, they might wish to develop a project in the area of group therapy, which is closely related.

If a person's anchor is security, that person will want to develop a self-directed learning project around the mainstream of his/her institution's work. If, for example, the person is working for a drug and alcohol rehabilitation service that also does community education, the security-anchored person probably would want to do a self-directed learning project within the main thrust of the institution--drug and alcohol counseling--rather than in the continuing education area.

By contrast, autonomy-oriented persons probably should choose a self-directed learning project that develops ability in an area that is somewhat peripheral to the main function of the institution. Is there a side function of the institution that has not been fully developed? Unless the area is a high institutional priority, this might be a very comfortable niche for the autonomy-oriented professional.

The person whose anchor is creativity is always trying to make a mark on the world outside. This person will want to plan for self-directed learning in areas new and upcoming to the institution and the field as a whole.

These anchors in the areas of study are not necessarily mutually exclusive. The creativity-oriented person and the technical/functional person might choose the same area for a self-directed learning project if it was new for the creativity person and related to a skill for the technical/functional person. I am suggesting that the recognition of one's own internal career anchor should be used as criteria in the selection of a self-directed project.

By this time, you've looked at, and tried to come to understand more about, how you learn. You've looked at your own job/career movement. At this point, you're ready to begin thinking about goals for the self-directed learning project for yourself. Use the next page to brainstorm a list of ten different areas in which you might wish to develop goals. They can be specific job-related skills. If you wish, you may choose some personal growth areas. Some people have chosen, for example, time management skills. The areas can be related to a hobby or an avocation, particularly if your career anchor is autonomy.

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WHAT ARE SOME AREAS IN WHICH I MIGHT WISH TO DEVELOP A GOAL?
(Brainstorm)

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

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After you've brainstormed at least ten possible goals for yourself, go through them and check the ones that seem consistent with your own career anchor(s). Now go through the list again and check those in which you already have some strengths. The rationale is that if you are totally lacking in background, perhaps choosing a formal educational process is more appropriate than choosing a self-directed learning process. Go through your list again and check all those you think you'd be excited about working on. Go through the list a fourth time and check the ones someone you know (either on the job or in another setting) would be interested in working on or would be someone with whom you could talk about your project.

Having gone through that analytical process, pull out one of the items that you wish to work on in more detail. Ideally, it should be one that has four checks in front of it, but make your own choice.

Using the space provided after this description, write a couple of sentences about what that goal would look like for you. A little bit later in the process, you will begin to identify some objectives which are parts of that goal and the process of developing some action plans. At this point, the most important task is that you write out a goal you feel is believable--something you could be motivated to work on and one that does not involve major amounts of time (over 100 hours) if this is your first self-directed learning attempt.

Now that you've set some goals for yourself, the next step is to describe some objectives that will help you reach that goal. Interestingly enough, the most straightforward, logical objectives to reach a goal are not always the most effective ones. Kurt Lewin is the originator of a process called the Force Field Analysis which helps people identify beginning points for working on resolutions of different problem issues. Our self-directed learners have found that this approach gives them new ideas about where to begin developing a skill.

On the following form, write your goal briefly on top of the page. Then, identify all the existing factors within yourself, within others, and within your general environment, that are supportive of accomplishing that goal. These are called "driving forces." Write those that inhibit accomplishing that goal. These are called "restraining forces." Don't write out specific actions you could take, but describe existing situations. For

example, driving forces might be your high motivation for the project, the need of your institution for people to develop this skill, the ready availability of training funds. Restraining forces might be lack of time, family pressures, lack of knowledge of good resources, your low motivation, etc.

Whenever you identify a factor, put an arrow beside it to indicate how big it is. A major factor might have an arrow all the way to the end of the page. Minor factors could be identified with smaller arrows.

Box 487/1901 E. First Street/Newton, KS 67114

GOAL STATEMENT: _____

_____

Driving Forces	Restraining Forces
Forces inside of persons	
Forces between persons	
Forces in the situation and/or institution	

Having set a self-directed learning goal and analyzed the driving/restraining forces, the next task is to develop some specific objectives related to that goal. Set your first objectives in areas that will help you deal with some of the major hindrances you've listed for achieving the goal. For example, if "not enough time" is the reason you will have trouble not developing additional skills in family therapy, you may wish to set as your first objective reducing committee work to have two free hours a week for working on your goal.

Now that you've dealt with a couple of major roadblocks, you will want to set some objectives that are more directly related to your goal. If, for example, your goal is to develop competence in the area of family therapy, you might set as your objectives: 1) reading of certain materials; 2) talking to individuals who are experts in this area; 3) participation in a conference; 4) writing a paper for presentation to other staff members; 5) volunteering to take cases that pertain to your area of interest.

Throughout the self-directed learning process, we've found that good definitions of objectives are important to the successful completion of the self-directed learning project. The following are questions you can ask yourself to see if your objectives will help you get to your ultimate goal.

1. Is the objective specific enough? It is essential that the learner know precisely what the objective really is. If the objective is stated so generally that the learner has to guess when evaluating his or her progress, the objective is not specific enough. If the learner has to guess whether the objective has been fully achieved, the objective is definitely not specific enough. Remember that Performance Objectives are to be stated in behavioral terms, and should be evaluated accordingly. Consider the philosopher Montaigne's statement: "No wind favors him who has no port."

2. Is the objective possible? Is it realistic? Wishes often run faster than abilities and are stymied by other natural "constraints." Keep in mind that most impossible objectives are not achieved. When impossible objectives are sometimes achieved, it is often due to the fact that what was considered to be the ultimate possibility was defined modestly. (See #3 below.) The pursuit of impossible, unrealistic, or difficult objectives can be enhanced by identifying "milestones" or sub-objectives along the way. (See #4.)

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3. Is the objective modest? Objectives which are modestly stated allow for the possibility of achievement which doubles, triples or quadrubles targeted objective attainment levels. Try doing that with an unrealistic objective! One is always free to do more than the modestly-stated objective delineates. There is no penalty for over-achievement. With an unrealistic objective, however, even more productivity can feel like failure if the targeted objective attainment level remains elusive.

4. Is the objective really several objectives disguised as one? Can the objective be broken down into a series of smaller interrelated objectives? A complicated, big project might be more approachable if conceptualized as 3 or 4 small projects. Big, complicated objectives are sometimes formidable because we either do not know what to do first, or because what we do seems too trifling or insignificant given the enormous size of the total task.

5. Is the objective personally meaningful? Is it interesting? Certainly, in a self-directed professional development paradigm, individual objectives must be self-determined and personally meaningful and interesting. Sometimes, objective achievement is poor because someone else's objectives are being pursued.

6. Will reaching the objective really be rewarding? Is it worth the effort? If reaching the defined objective is not going to be rewarding, why bother? Although learning is often its own reward, it is not very likely that many people enlist in a self-conscious professional development effort without expecting an extrinsic payoff of some kind. Have you determined what yours will be?

7. Will achieving the objectives mean actually achieving the goal? You may have a set of objectives that are interesting and meaningful and good to work on, but do you know you will have achieved your goal when you have finished your objectives? For example, if the objectives are to develop more confidence in family therapy, will reading books actually do that for you? It seems logical that reading some books would be helpful, but as you think about yourself you may decide that reading doesn't really improve competence for you.

8. Have you formally identified and monitored the objectives you are taking for granted? Pay attention to this, because it is probably not as obvious as the others are. When we define objectives for ourselves, we identify areas wherein we have failed to accomplish what we want. If we are not careful, we will simply refashion the failures of the past into the objectives of the future. And, with what we know about past behavior as the single best predictor of future behavior, we are not left with a very favorable prognosis for our objective attainment. One possible solution to this situation is to identify and monitor objectives that are taken for granted, objectives that are already being achieved adequately, and objectives that require no new efforts or energies. It is probably unfortunate for the health of one's professional development program that he or she is inclined to say: "I do not need to identify 'X' as an objective because I know I'll do that."

Now that you've answered these questions for yourself, you may wish to rewrite some of your objectives into a more usable form.

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My SDL goal is _____

_____

_____

_____

Objectives required to achieve the goal are:

1.

2.

3.

4.

You've gone through the two most important steps in setting up a self-directed learning project--setting up a goal and writing out some good objectives. Unfortunately, there are still a number of roadblocks along the way. In our experience with self-directed learners, we've identified different roadblocks. The purpose of the next session is simply to share that information with you. This material will help you prepare for doing the last step in developing your project. That is to write out a detailed action plan. The guidance provided in this section can give you substantial help in writing this plan.

START UP ISSUES

Just getting started is a major issue in self-directed learning. You don't have a course date or a registration date staring you in the face. It's up to you to decide when to get going. Many people develop plans and never figure out how to start on them.

One way to solve the start up issues is to start small. Pick something simple you know you can do as your first beginning point. Build on an existing structure. For example, if you work in a mental health center where there are weekly case conferences, you might make one objective monitoring that case conference for problems fitting a particular area interesting to you. Write down, after each conference, whether anything happened relating to your area of interest.

A second way to solve some start up issues is to develop contingency plans before you become roadblocked. If you wait until something has gone wrong, and a major resource you are counting on is no longer available, you will probably feel discouraged and depressed. Now, while you're still feeling good and self-confident, is the time to identify what you are going to do if something goes wrong at a major point in your project.

A third thing to do is to talk to other people about what you are doing. Tell your friends, your spouse, your colleagues at work, what you've determined you're going to do. They can ask you about it, providing some external motivation to get started.

At this point, list for yourself two or three things that generally make it easy for you to get started on a project, as well as two or three things that make it difficult to get started on a project.

Box 487/1901 E. First Street/Newton, KS 67114

PERSONAL ASSISTANCE

Another important component in a good self-directed learning project is effective use of two types of specific personal assistance. In the start-up issue, we referred to the value of telling other people what you're doing. In the development and carrying out of a project, you will probably need two additional types of assistance. The first of these is a learning facilitator and the second is a content facilitator. Briefly, the learning facilitator is someone who will be a friend and will keep in touch with you throughout the course of your coming project. The content facilitator is a person who has the expertise in the particular area you are working with. You may wish to have more than one content facilitator for your project or you may wish to have none at all. Guidelines for the choice of both the learning facilitator and content facilitator follow:

THINGS TO LOOK FOR IN A LEARNING FACILITATOR

1. Look for someone who is willing to enter into a contractual agreement with you. Although monetary compensation or something similar may be used to purchase the learning facilitator's services, many other possibilities also exist. In any event, the basis of a workable contract almost certainly has to be mutual benefit. Consider selecting someone who wishes to join you in the learning project either as a co-participant or as a parallel participant. Another good possibility is someone who intends to pursue in the future what you are undertaking currently. Such a person will usually be very eager to hear what you have learned.

2. Look for someone with whom you have a good relationship. You must have someone who is not afraid to be honest with you. This someone should be able to push you or confront you when that seems needed, but also able to encourage you or reward you when he or she has a favorable impression of your progress. You should select someone you would seek out for advice and friendship even if you were not involved in a learning project.

3. Look for someone with whom you are in frequent contact. Good facilitators are accessible. Certain friends, colleagues, spouses, or other relatives usually satisfy this important criterion. Sometimes the selection of dual facilitators--one from home and one from the work setting--is meaningful.

Our experience in the SDPD Program to date suggests that most learners do tend to select the facilitators with whom they relate well. However, there is frequently too little attention given to a mutually beneficial contractual agreement. Too often the facilitator has little to gain from the role and, hence, attempts at real facilitation occur rarely. The criterion of accessibility has often been overlooked. It seems unlikely that much good facilitation will be forthcoming unless all three criteria are met.

SOME THOUGHTS REGARDING THE ROLE OF CONTENT CONSULTANT

The content resource person or content consultant is someone who has expertise in an area of study or growth the learner has selected. In this area, the content consultant has greater knowledge than the learner. In fact, it is this knowledge, or at least a portion of it, that the learner would like to acquire. It is this desire for knowledge acquisition which motivates the learner to identify a given person as a content consultant.

There are some similarities between the roles of learning facilitator and content resource person or content consultant, but there are obvious differences as well. Negotiating a mutually beneficial contract is of critical importance in both roles. In some respects, it may be more crucial to the content consultant role since the learner/content consultant relationship does not necessarily have the benefits of an otherwise sustaining relationship. Although a good interpersonal relationship with a content consultant is desirable, it is not really indispensable. We choose learning facilitators on the basis of who they are, while we choose content consultants because of what they know. Frequent contacts and easy accessibility are also desirable in the learner/content consultant connection, but these aspects seem to be less important than they are in the learner/learning facilitator liaison--especially if the learner has acquired some self-directed capacities. Some primary functions of the content consultant appear to be the following:

1. Stimulation. The content consultant should have the capacity to excite the learner with the content of the chosen area of study. This excitement may develop from some inherent attractiveness in the subject matter, by observing the mastery displayed by the consultant, and perhaps by observing external criteria of "success" which the consultant seems to enjoy because of such mastery.

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2. Guidance. The consultant should be able to advise and recommend in a variety of ways. The consultant should be able to identify what experiences would be useful to the learner and, conversely, what pursuits would likely be unworthy of learner time and effort. He or she should have some grasp of the historical development of the selected field of inquiry and how one may systematically develop expertise within it. Knowledge of what to read and what workshops, courses, training seminars, field placements, and other endeavors (formal or informal) would be useful should fall within the consultant's sphere of knowledge.

3. Review. The consultant should be able to provide a quality review (or overview) of the area of study--and from an insider's viewpoint. From such reviews, the learner should be able to obtain a glimpse of the breadth of his selected study area as well as get some feel for his or her own level of development within it.

4. Evaluation. When the consultant adopts an evaluative stance, the situation can become a bit threatening or unpleasant to the learner. However, these unpleasantries can be mitigated considerably if the learner requests or initiates the evaluation process. And with self-directed learning, learner-initiated evaluation is the normative. Certainly, evaluation by an expert should have great value. Evaluation may focus on knowledge acquisition, skill level, one's potential, employment possibilities, and, no doubt, a host of other areas.

5. Documentation. If the learner needs documentation of some kind of learning acquired through the services of a consultant, the consultant--expert that he or she is--should be able to provide this need in a convincing fashion. Naturally, if this feature is important to the learner, it should be a specific part of the contractual agreement. And, of course, the learner has to convince the consultant that learning did, in fact, occur.

6. Recommendation. If the learner has done well in the course of his or her training or study, the consultant may be in a position to recommend the learner to others. Thus, the consultant may be able to play some role in increasing the learner's opportunities for even greater personal or professional growth.

JOB RELATEDNESS

We've talked about the need to relate self-directed learning projects to a career anchor. For those of you who have chosen a self-directed goal directly relevant to your present job, build upon that job relatedness. The first thing you might wish to do is talk to your supervisor about what you're doing. Get advice and encouragement in that project. It may even be that it is possible to back off on some other assignments in order to make some on-the-job time available for this project.

If your goal is clearly related to your present job or another needed task within your institution, you may be able to use leave time and money from the institution for special training related to your self-directed learning goal. Many institutions have a one or two-week leave policy and a certain amount of funds available for that. That might be the way to attend a special conference to get you started on your project.

A third way to integrate your current job is to volunteer for some special assignments that relate both to your job and to your project. For example, people who are particularly interested in the dynamics of careers may volunteer to lead a short career planning workshop three months from now. This certainly provides the integration and the impetus to get going on a self-directed learning project related to career planning.

PROGRESS MEASUREMENT

A fourth major way that you can help yourself in your self-directed learning program is to develop some type of progress measurement system. In our project, we found at least four different methods to be helpful.

1. The Journal Method. This system is rather open-ended. It permits introspection and reflection as well as an opportunity to record progress systematically. One potential shortcoming is that it may become too unwieldy over a sustained time period, unless someone has a strong preference for this method. Another shortcoming for some is that this method does not readily lend itself to the task of quickly and conveniently extracting precise information.

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2. Graphing. For goals which permit a graphing system, and for those who like visual displays, either cumulative graphs or graphs which plot behavior over specified time periods offer another way to monitor progress. Though the process of building a graph can be rather mechanistic--and, hence, amount to a negative experience for some--the developed graph may sometimes present a surprisingly holistic representation of one's learning productivity. Such a display may be instructive for change, especially if characteristic patterns emerge over time.

3. The Performance Goal Checklist. It is sometimes useful to make a list of all performance goals and to divide each goal into measurable units (e.g., book chapters, book pages, hours of interviewing, etc.). One can then mark with a check (or perhaps by recording the date the unit was performed) when a unit of a given goal has been accomplished. It is recommended that multiple copies of this list be available, one for each location where goal-directed behavior is expected to occur. Two logical places are the home and the office. The strength of this system is that it permits rapid and convenient recording. Thus, credit received when credit is due is more likely.

4. The Calendar. In a conversation with Ogden Lindsley at the University of Kansas, he suggested that the calendar was a valuable, readily available, self-monitoring instrument. Almost everyone uses it for scheduling intentions. It can also be used to record accomplishments and thus serve as an historical record or progress. Large calendars which have space available for writing are preferable.

Two of the above could be combined, and there may be other ideas in this area. Anyone who wishes to share is invited to do so.

REWARD SYSTEM

The last guideline for a successful self-directed learning plan is to develop some intermediate rewards for yourself as you complete portions of the action plan and the general objectives. Even though we've tried to be fairly specific about it, it is often hard to know when final goals have been achieved. We hope you will know when you've achieved specific objectives. In any case, it's helpful to plan in advance: this part of my action plan is particularly difficult for me; I will reward myself by doing something I enjoy when I finish this project.

ACTION PLANS

You are now ready to begin writing some detailed action plans for yourself. Take your general goal: for each objective write out some specific action plans. They do not have to be elaborate, but detailed enough to provide guidance as you progress. Remember to write where you're going to start and what the sequence of activities is. Look back over what you have written to be sure you have:

(1) identified someone as a learning facilitator and content facilitator

(2) thought how that may fit your present job

(3) chosen your own methods of measuring performance

(4) planned your rewards

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OBJECTIVE #1

Action Plans/Learning Projects	Completion Date	People Assisting	Progress Measurement Method	Reward System

OBJECTIVE #2

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OBJECTIVE #3

Action Plans/Learning Projects	Completion Date	People Assisting	Progress Measurement Method	Reward System

OBJECTIVE #4

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OBJECTIVE #5

Action Plans/Learning Projects	Completion Date	People Assisting	Progress Measurement Method	Reward System

OBJECTIVE #6

A FINAL CHECKLIST

After you've completed this and tried to work on things, you may find yourself not getting anywhere. The following checklist is a diagnostic tool for trying to determine why you're having trouble. Go through the questions. When you hit the first "no," you've found the beginning point for reorganization of your self-directed learning project. In other words, if the answer to number 1 is "yes," go on to number 2. If the answer is "no," begin there to revamp your work. Items 7, 8 and 9 were hard to set up in logical sequence, so you may wish to look at those in any order that makes sense to you.

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DIAGNOSTIC QUESTIONS FOR SELF-DIRECTED LEARNING PERFORMANCE IMPROVEMENT

1. Are goal and learning projects personally significant?

2. Do they fit with my long-term career anchors and direction?

3. Have I defined reasonable sized learning projects?

4. Are my learning projects specific enough to be measurable?

5. Have I located adequate people and resources to assist me in the projects?

6. Has a key specific action been blocked by external forces?

7. Have I received any rewards for work completed?

8. Has time management/self discipline been a problem?

9. Has money been a problem?